2026 Tax Preparation Checklist

Please provide the following documentation:

All Forms W-2 (wages) SSA-1099 (social security), 1099-INT (interest), 1099-DIV (dividends), 1099-B (proceeds from broker or barter transactions), 1099-R (pensions and IRA distributions), Schedules K-1 from partnerships, S corporations, estates and trusts, and other income reporting statements, including all copies provided from the payer, 1099-K or 1099-G (Unemployment compensation), 1099-MISC, OR 1099-NEC.

Form 1095-A (for health insurance purchased through a public exchange "Obamacare" Marketplace).

If you are a new client, provide copies of last year's tax returns, social security cards and driver's license.

The completed Individual Income Tax Yes or No Questions.

Copy of the closing statement if you bought or sold real estate.

Detail of estimated tax payments made, if any.

Income and deductions categorized on a separate sheet for business, rental activities and farms.

Student loan interest

Charitable cash donations for those that do not itemize up to $600 Married, $300 Single

Last paycheck stub or statement from employer showing overtime wages

For those who itemize their deductions:

- ☐ Mortgage Interest Statement Form 1098
- ☐ Out of pocket medical expenses
- ☐ Charitable contributions cash and non cash
- ☐ Personal Property Tax
- ☐ Real Estate Tax
- ☐ For virtual currency users, income from sales will need statement from conversion platform.

After looking at your answers to yes and no questions, If I need some additional information I will call, or email. We do leave messages so please make sure your voicemail is available and check it during the time we have your information.

Thank you,

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